Virtual Learning and Engagement Planning Checklist
The Virtual Edge

You for Youth

Planning Checklist

Use this checklist to record ideas and track your planning process for integrating virtual tools and settings into your program routine as you complete the tasks listed below.

Planning Checklist

Your program team consists of staff members, and an expert or two, who'll help you plan, design and implement ways to introduce virtual tools and settings into program activities — and then assess what you're doing to ensure continuous improvement. Together, you'll learn about ways to use virtual technologies to reach program goals, support students in developing virtual skills for higher education and the workplace, and prepare for short- or long-term emergencies that require using virtual programming on a full-time basis.

When gathering your team and experts, ask yourself these questions:

- Do we have the right knowledge and resources?
- How can virtual learning and engagement support program and student goals?
- How can we stay up-to-date on technology?
- Where will we find the time?

Introduce the Virtual Approach and Get Buy-In

☐ **Coordinate to define technology tools.**
　　☐ As you work to align your program's virtual tools and platforms with ones used during the school day, consider how to make the environment familiar and easy for families and students to navigate.
　　☐ Make sure everyone understands their role and tasks.

☐ **Plan when and how you'll work together.**
　　☐ **Meetings:** When, where and how often will you meet? Virtually, in person or both?
　　☐ **Communications:** What tools and channels will team members use?
　　☐ **Timeline:** Have you jointly established deadlines for key milestones?
　　☐ **Sense of purpose:** Do you solicit team members' input, thank them and share successes?

☐ **Identify potential tech wizards.**
Here's a list of people who might act as tech-wise advisors to your team. Select ones you'd like to join your quest to The Virtual Edge. If you know specific people, add their names!
　　☐ School/district instructional technology (IT) staff members
　　☐ School/program staff members with high level of technology expertise
　　☐ Community partners
　　☐ Family member(s) of attending students
　　☐ Tech-savvy current or former student(s)
　　☐ Other: _____
　　☐ Other: _____

Resources
Use these Y4Y tools to increase your background knowledge and understanding:

- **The Virtual Edge at a Glance**
- **Virtual Learning and Engagement Research Brief**

Planning Checklist

Conduct Tech-Wise Basic Training

This basic training will help staff members get into the "tech-wise mindset." That is, they'll start to be more *comfortable* and *smart* about using technology, be *flexible* about moving from in-person programming to hybrid and virtual programming, be *strategic* about using technology in all settings, and be *goal oriented* to use technology effectively.

☐ **Learn about tech-wise modes, settings and other vocabulary.**
- ☐ Define the in-person, hybrid and virtual settings.
- ☐ Define synchronous, asynchronous, resource-facilitated and instructor-facilitated learning modes.
- ☐ Define other tech-related terms, such as digital citizenship, digital equity and the "new" digital divide.

☐ **Collaborate with the school day to plan and conduct training.**
- ☐ Support staff and students by conducting joint training on shared virtual tools and approaches to using technology.
- ☐ Identify internal tech wizards who can help to mentor other staff members.
- ☐ Stay in touch to ensure that everyone gets up-to-speed when new virtual tools are introduced.

☐ **Connect the tech-wise modes to existing knowledge and practice.**
- ☐ Explore the common areas among in-person practices and virtual practices to help staff recognize what they already know.
- ☐ Provide examples of ways to convert in-person activities to hybrid and virtual settings.
- ☐ Consider best practices for staff to set up their home spaces for virtual delivery (e.g., camera position, lighting, microphone, background).
- ☐ Learn how to use the safety features of the online platform and apply best practices to ensure online safety for students.

☐ **Introduce virtual powers and power principles.**
- ☐ Define and discuss technology power, equity power, relationship power and personalization power.
- ☐ Discuss the power principles presented in The Virtual Edge course, and think about how they would apply to specific students in your program and to groups of students, such as English learners, students with disabilities (including those who receive special education services), or students from immigrant or migrant families.

Resources
Use these Y4Y tools to build your knowledge:
- **Technology Decision Checklist for Learning and Engagement**
- **Virtual Powers Explainer**

Use this Y4Y Training to Go to coach and train your staff:
- **Online Safety and Netiquette**

Planning Checklist

Mission: Manage Your Program

☐ **Create electronic files and secure online storage.**
- ☐ Identify what you'll need if an emergency moves your program to its virtual setting. You don't want to find yourself without family contact information, activity plans and other important information.
- ☐ Be sure electronic files are password protected and available to all staff who may need them.

☐ **Review your program SMART goals.**
- ☐ Address use of all three settings — in person, hybrid and virtual — in your program SMART goals and professional learning plan. SMART goals are specific, measurable, achievable, realistic and time bound.
  Goal example: By the end of [insert school year or program session], 100% of staff members who work directly with students or interact with families, school-day staff and community partners will participate in at least three trainings to improve their mastery of virtual technology tools and settings, as outlined in the program professional learning plan and measured by attendance records and/or certificates of completion.

☐ **Address virtual safety and etiquette.**
- ☐ Review Family Educational Rights and Privacy Act (FERPA) requirements related to protecting student privacy and make sure appropriate controls are in place for electronic versions of files.
- ☐ If you don't already have netiquette policies and procedures in place for staff members, work together to develop them. Be sure to create similar policies for working with students to develop netiquette procedures they will follow.

Resources
Use these Y4Y tools to support your planning:
- **Activity and Program SMART Goals**
- **Data Tracking Packet**
- **Sample 21st CCLC Budget Worksheet**

Use this Y4Y Training to Go to coach and train your staff:
- **Understanding Families and FERPA Training to Go**

Use this Y4Y course to support program management:
- **Managing Your 21st CCLC Program (Introduction section)**

Planning Checklist

Mission: Engage Stakeholders

☐ **Define preferred communications channels.**
- ☐ Survey school-day partners, families and community partners to define preferred communications channels. Be sure to identify the technology-based methods that work best for each group, and consider how you'll provide information in the home languages of people who haven't mastered English.
- ☐ Maintain up-to-date contact information by doing regular checks as each program session starts.

☐ **Develop a communications plan.**
- ☐ Set up a multipronged communications plan that enables you to target specific audiences and also provide the right information to the larger community.
- ☐ Maintain separate mailing lists so you can get appropriate information to the right audiences at the right times.
- ☐ Combine social media with print and broadcast media to conduct outreach and tell the general community about your program's events and successes.

☐ **Create a community asset map and contribute to a strong network of support.**
- ☐ Collaborate with community organizations and agencies to ensure a strong network of support for students and families. Promote one another's services through your social media channels and by cohosting in-person and virtual events.
- ☐ Share the community asset map with staff, families and partners by providing the information in print and online, and in the home languages of your students' families.

Consider the following when mapping assets:
- ☐ What resources does our program already know about, and what services do they provide to the community?
- ☐ What government agencies and community organizations may step up to support our families during an emergency? How can we help these groups connect with our stakeholders?

Use this space to brainstorm potential new assets:
- ☐ Asset 1: _____
- ☐ Asset 2: _____
- ☐ Asset 3: _____
- ☐ Asset 4: _____
- ☐ Asset 5: _____

Planning Checklist

Resources
Use this Y4Y tool to help you recruit partners and map community assets:
- **Community Asset Mapping**

Use these Y4Y courses to learn about building school, family and community partnerships:
- **Continuous Education**
- **Strategic Partnerships**

Mission: Support and Develop Staff

☐ **Assess staff training needs.**
    ☐ List the virtual tools and platforms you defined at the start of this checklist, and survey staff to determine their perceptions of mastery. You may identify people who are already tech wizards with one or more tools.
    ☐ Ask staff members if they'd like to become a mentor with any of the defined tools — growing your own wizards is a great idea!
    ☐ Ask staff to suggest technology tools that aren't on the defined list but may be easy to access and use during activities.

☐ **Identify tech wizards, and plan and deliver professional learning events.**
    ☐ Collaborate with your school-day partners to schedule joint training events on using the virtual technologies you have in common. You'll make it easy for everyone if you agree about ways to set up virtual program spaces and activity materials. Parents who support students from home will especially appreciate this consistency.
    ☐ For program-specific content, take advantage of free and low-cost resources — Y4Y has a great selection, some of which are highlighted on this checklist.
    ☐ Identify tech wizards who are willing to help in a variety of ways, such as delivering training (live and recorded) to staff and families and providing tech support during program sessions. Remember that wizards may wear many hats — in addition to district and school media specialists, some may be family members, community volunteers, or college or high school students.

☐ **Be intentional about using virtual tools and settings for staff support and development.**
    ☐ Apply virtual best practices to make the most of everyone's time and knowledge.
- Rotate leadership of learning events so all staff members have opportunities to learn presenter skills.
- Try "flipping" the classroom by presenting content in the asynchronous mode. Follow up with synchronous sessions to process the learning, practice new skills and plan how to integrate learning into daily activities.

Planning Checklist

☐ **Provide professional, social and emotional support for and with technology.**
- ☐ Set up virtual office hours so staff can schedule times to talk with you.
- ☐ Schedule regular debriefing sessions to discuss technology experiences. Identify what's working and what needs to be tweaked. Hold sessions in person and via technology, according to what's most convenient from week to week.
- ☐ Make technology friendly by using it to relax together. Socialize a bit before and/or after you share an online exercise or yoga class with your staff.

Resources
Use this Y4Y resource to identify professional development needs and get training materials:
- **The Virtual Edge (Coaching My Staff section)**

Mission: Expand Student Opportunities and Supports

☐ **Help students build independent learning and other future-focused skills.**
- ☐ Help students succeed with virtual learning by strengthening their independent learning skills, such as managing time, prioritizing tasks, organizing ideas and collaborating with others.
- ☐ Help students master technology tools that support college and career performance. Although students may spend hours every week communicating with peers via text messages, they may not know how to use a structured, online discussion to solve problems with team members.

☐ **Expand student horizons.**
- ☐ Vary your approach to activities by sometimes using virtual platforms to engage guest speakers, tour college campuses, visit local workplaces and take educational field trips. All provide opportunities for students to learn about themselves, real-world job expectations, and education and career options.
- ☐ Help students strengthen their digital literacy skills so they can conduct research using reliable sources, use social media wisely and be responsible digital citizens.

☐ **Focus on student engagement during virtual and asynchronous activities.**
- ☐ Listen to student voice and honor student choice. As with in-person activities, you'll improve student engagement when activities reflect their interests.
- ☐ Help students bridge the new digital divide. Encourage content creation, not just content consumption. Give guidance and tools to support creation of videos, podcasts, apps, online interest boards and other media.
- ☐ Provide a variety of engagement formats and response options. Small-group discussions, polls, breakout rooms, and working in pairs or teams can support different learning and personality styles.

Planning Checklist

☐ Remember to build social presence in the virtual environment, especially during an extended school closure. Plan for a few minutes to chat, play a game or engage in a physical activity before settling into an on-screen learning activity.

Resources

Use these Y4Y tools to help you plan, design and implement activities:

- **Celebrating in a Virtual Environment**
- **Elementary Student Interest Survey/Inventory**
- **Intentional Activity Design Planner**
- **Screen Time Alternatives**
- **Secondary Student Interest Survey/Inventory**
- **Virtual Activity Planning Examples**

Use these Y4Y Trainings to Go to coach and train your staff:

- **Engaging Students in Virtual Settings**
- **Strategies for Meeting Diverse Learning Needs in Virtual and Hybrid Settings**

Use this Y4Y Click & Go to enhance your staff's understanding:

- **Digital Literacy Click & Go**

Mission: Engage Families

☐ **Open two-way communication lines.**

☐ Identify families' preferred methods of communication and keep the information up to date. Likewise, make sure family members know how to reach you.

☐ Prepare print and online information in families' home languages, and post important information in a dedicated space on your program site.

☐ **Support family technology use.**

☐ Use a family survey or individual interviews to find out what level of internet access and equipment is available at homes. Work with school-day or other partners to improve access for families who need help.

☐ Introduce technology approaches and skills. Family members are your students' support teams when programming goes virtual. Invite them to a live virtual introduction on how to navigate the virtual program space. Be sure to record that event and let all families know it's available on your program site for anyone who needs it later.

☐ Provide information on setting up a home learning space where students can feel comfortable about going on camera and can focus on activities without disruptions.

☐ Reflect with colleagues from other sites and programs. Be one another's best resources for identifying approaches that help you build stronger connections to families.

Resources

Use these Y4Y tools to help you support families:

- **Family Engagement Communication and Record Keeping**
- **Creating a Home Learning Nook**
- **Tips for Families: Managing Screen Time and Study Time**

Planning Checklist

Mission: Implement With Fidelity

☐ **Identify and capture data.**

　　☐ Having data is like having gold! Identify the data nuggets you'll need to collect to demonstrate progress, tell your success stories, gain or retain funding sources, and, of course, complete your annual performance reporting.

　　☐ Apply your data to measure fidelity of implementation. Its components are adherence, dosage, engagement and delivery.

☐ **Use rubrics and other authentic assessments to look at program performance.**

　　☐ Use assessment methods such as rubrics, observations, portfolios and projects to track student progress and staff performance.

　　☐ Employ your continuous improvement process to improve program practices if students don't reach the goals you intended.

Resources

Use these Y4Y tools to help you collect and use data:

- **Data Training Packet**
- **Virtual Activity Observation Checklists**

Use these Y4Y courses to learn more about using data and authentic assessments:

- **Continuous Education**
- **Managing Your 21st CCLC Program (Introduction section)**